FINCALC

PRESS RELEASE

FinCalc Launch New Client Portal

COLCHESTER, ENGLAND – January 2022

Cashflow and DB transfer software provider FinCalc have today announced the launch of their new Client Portal.

The FinCalc Client Portal is an effective means of communication between adviser and client that not only improves the day-to-day servicing for clients, but also builds a stronger client engagement in real time.

Gavin Shears, Senior Product Consultant at FinCalc, believes that this new Client Portal provides financial planners and their clients with a way to have a secure conversation and to safely share information with each other from any online PC, tablet or mobile phone. This will save an adviser valuable time when onboarding a new client or when undertaking a periodic client review.

Shears added, "We have been asked by many existing and potential customers to provide a way to enable them to onboard a client, have a digital fact find for clients to complete and to have a seamless integration of client financial data into our tools. Our Client Portal achieves all of this and more. Some of the main features of the new Client Portal are:

- Client Onboarding (Invite clients or let them self-onboard)
- Secure Messaging (2-way messaging with notifications)
- Secure Document Exchange (Including digitally accepting documents)
- Digital Fact Find
- Back Office Integration

To enhance the client experience, each Client Portal will be fully white labelled to the adviser firm. We also have the latest banking grade security and encryption, plus clients can also use multi-factor authentication to add that extra layer of security."

FinCalc believe that the Client Portal will enhance client engagement. Advisers will save time and administration costs as this platform of communication provides the much-needed flexibility that clients and advisers require today.

To find out more about the FinCalc Client Portal, please visit
https://www.fincalc.co.uk/tools/client-portal/

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INFORMATION FOR EDITORS:

About FinCalc

FinCalc is a leading provider of financial planning tools including cashflow modelling and DB transfer analysis software to UK financial advisers. FinCalc is the technology platform created by O&M Pension Solutions to ensure that advisers are equipped with user friendly tools that will help them provide their clients with fully comprehensive advice.

O&M Pension Solutions was setup as a separate company in 2013 as part of the split of O&M Systems and specialised in the TVC/TVA software and services market. Director Jason Wykes was part of the original team who setup O&M Systems in 1992.

Contact Information: www.fincalc.co.uk

Gavin Shears, Senior Product Consultant, on 01206 803210